



FY2025

Financial Results Presentation

Seven & i Holdings Co., Ltd.

April 9, 2026

Opening – Market Landscape and Our Competitive Edge

Shifts in Consumer Behavior



A clear shift toward value



Rising expectations for great-tasting, high-quality food



Demand for more convenient shopping



Our Competitive Edge



Merchandising

Compelling products with APSD food sales higher than national competitors



Store Network

Unmatched network with approx. 30 million daily customers in Japan and North America, strong QSR with multiple formats



Operational Excellence

Field support, Retailer Initiative (Tanpin-Kanri) and franchisee network



7NOW

Unique digital platform to enhance customer convenience and drive further growth



Opening – Progress and Priorities

**Momentum Built in FY2025; Transformation Accelerates in FY2026;
Financial Impact Scales from FY2027 Onwards**



Disciplined Execution

- Stronger global connectivity
- Clearer alignment and accountability
- Shared focus on delivering customer value

2025

Momentum Regained



2026

Momentum Accelerated



2027 onwards

**Accelerated
Financial Impact**



**Reinforce the fundamentals. Maintain disciplined capital allocation.
Evolve with customer needs.**

FY2025: Tangible Progress Toward Value Creation



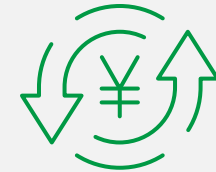
Record-high Net Income

Steady Momentum
Building for Growth

7-Eleven

Shift to Pure Convenience Store

Completed Deconsolidation
of York HD and Seven Bank



Shareholder Return

Completed ¥600Bn
Share Buyback

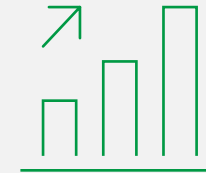
FY2026: Elevating Customer Experience for Sustainable Growth

Quality



- ✓ **Better experience** through store renovations and 7NOW
- ✓ **Stronger products** underpinned by our value chain and merchandising
- ✓ **Smarter operation** with enhanced support for growing franchise network

Value



- ✓ **Deliver value** with private brands and fresh foods
- ✓ **Create value** with our value chain optimization
- ✓ **Maximize value** through rigorous cost management

**Better customer experiences drive store traffic,
stronger earnings for our entrepreneurial franchisees and growth across the Group**

SEI IPO Targeted for FY2027 at the Earliest; Shareholder Return Policy Unchanged

Transformation Progress

Demonstrating tangible results from transformation

Market Conditions

Prioritizing customers amid market uncertainty







SEI IPO timing revised to FY2027 at the earliest

- Shareholder return policy unchanged: ¥2.0Tn buyback by FY2030 (incl. ¥0.6Tn completed in FY2025) and progressive dividends



We are Confident in Our Trajectory to FY2030, Delivering Better Stores, Products and Services—and Exceeding Customer Expectations

-  **Momentum regained, with disciplined execution driving acceleration in FY2026 and further accelerated financial impact from FY2027 onwards**
-  **FY2025- Record-high net income
FY2026- Solid revenue and profit growth (excl. deconsolidations)**
-  **Elevating Customer Experience for Sustainable Growth
-Focused investment in customer experience and stores**
-  **CAGR to 2030: APSD growth of 2.5% to 3.0% for SEJ and 3.0% to 5.0% for SEI; and Consolidated EBITDA growth of approx. 7.0%**

Note) The period covered by the CAGR (Compound Annual Growth Rate) is fiscal 2025 through fiscal 2030

AGENDA

- 1 FY2025 Results
- 2 FY2026 Forecasts

AGENDA

- 1 FY2025 Results
- 2 FY2026 Forecasts

FY2025 Consolidated Results Highlight

- ✓ FY2025 full year consolidated results achieved the revised plan through rigorous, disciplined execution
- ✓ Strong momentum toward renewed growth recovered following structural reforms and a focus on the CVS business
- ✓ In addition, steady share buybacks executed, delivering record-high net income and EPS

Billions of yen

| | FY2024 results | FY2025 results | YoY | vs. Plan |
|-----------------------------------|-------------------|-------------------|--------|----------|
| Group's total sales* ¹ | 18,442.8 | 16,992.0 | 92.1% | 99.5% |
| EBITDA* ² | 995.5 | 942.8 | 94.7% | 102.2% |
| Operating income | 420.9 | 422.9 | 100.5% | 104.7% |
| Net income | 173.0 | 292.7 | 169.2% | 108.4% |
| EPS | 66.62 yen | 118.81 yen | 178.3% | 108.4% |

*1 Group's total sales includes the sales of franchisees of Seven-Eleven Japan, Seven-Eleven Okinawa, 7-Eleven, Inc. and 7-Eleven Stores Pty Ltd.

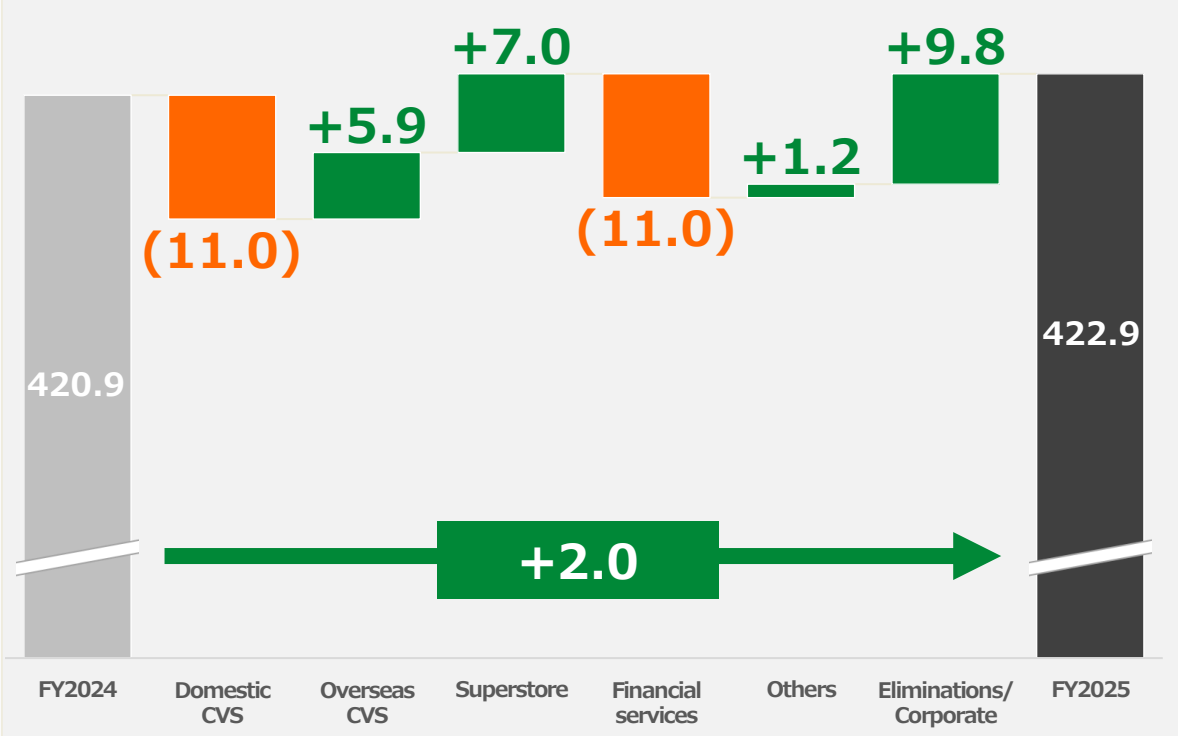
*2 EBITDA: Operating income + Depreciation and amortization + Amortization of goodwill

Note) Exchange rate: 1USD=149.61JPY, 1CNY=20.81JPY

FY2025 Consolidated Results Highlight

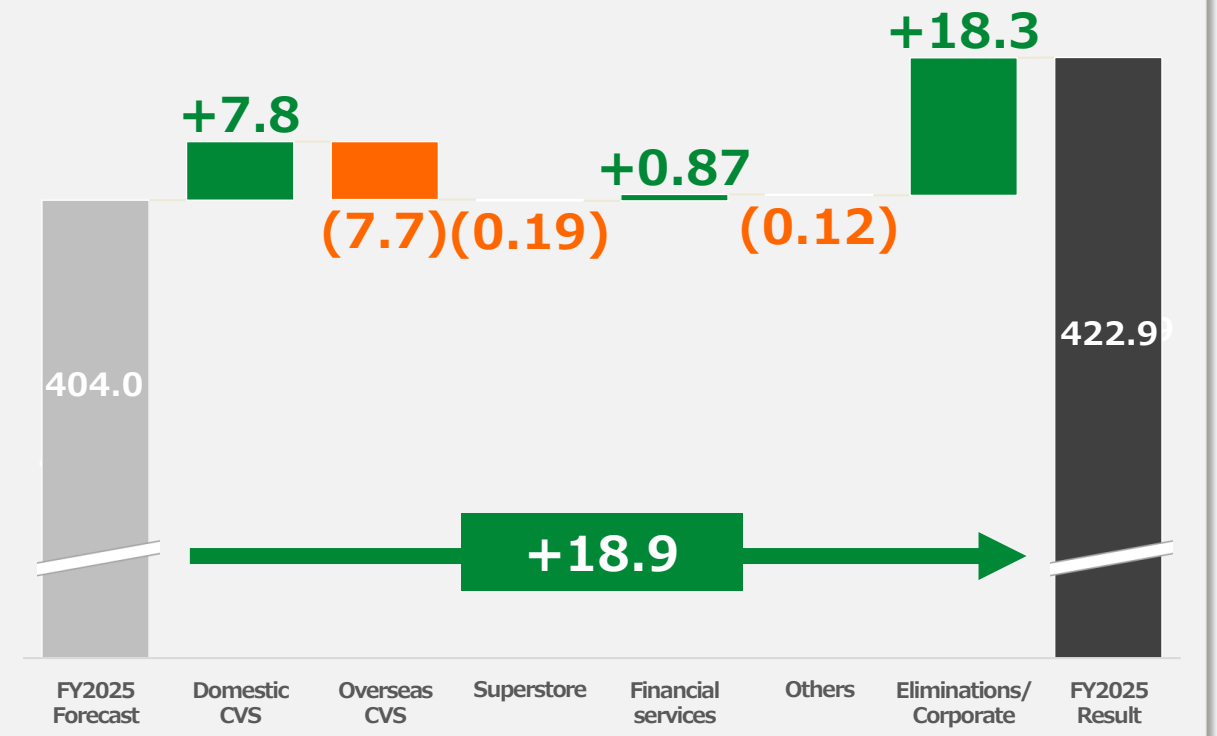
Operating income (YoY)

✓ YoY 100.5%/change +2.0
Billions of yen



Operating income (vs. Plan)

✓ vs. plan 104.7%/change +18.9
Billions of yen

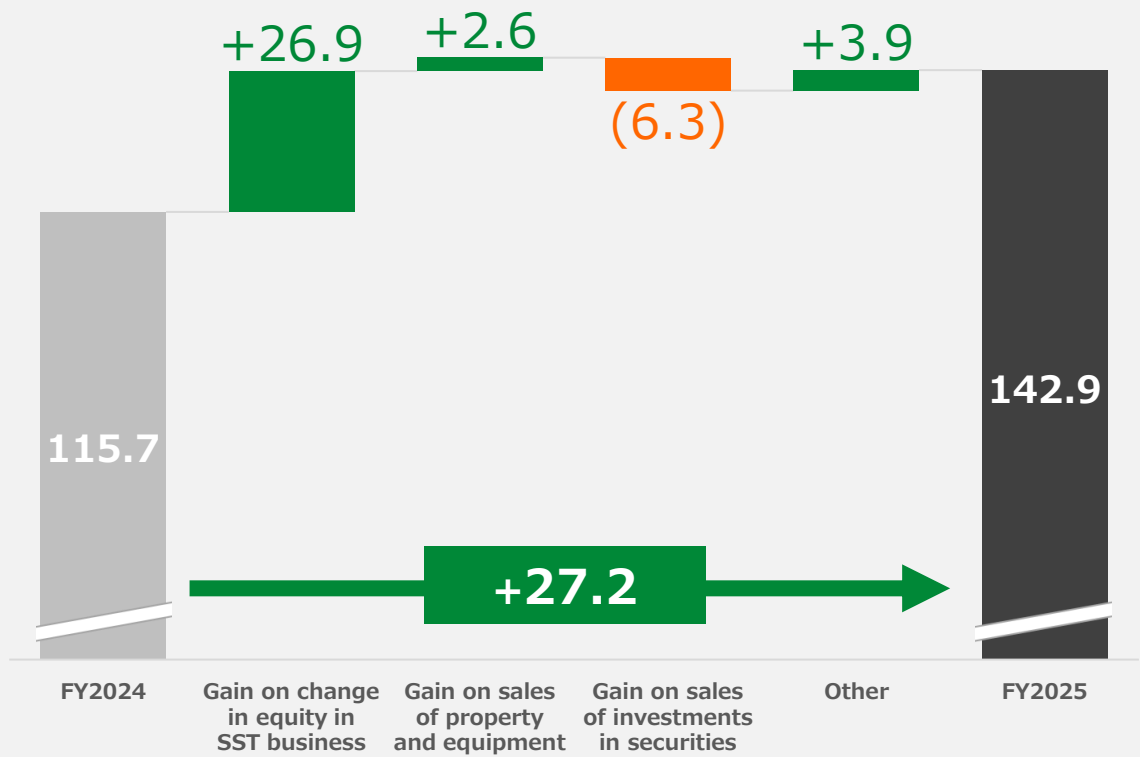


FY2025 Consolidated Results Highlight

Special gains

- ✓ YoY 123.5%/change +27.2
- ✓ Optimization of Asset Holdings

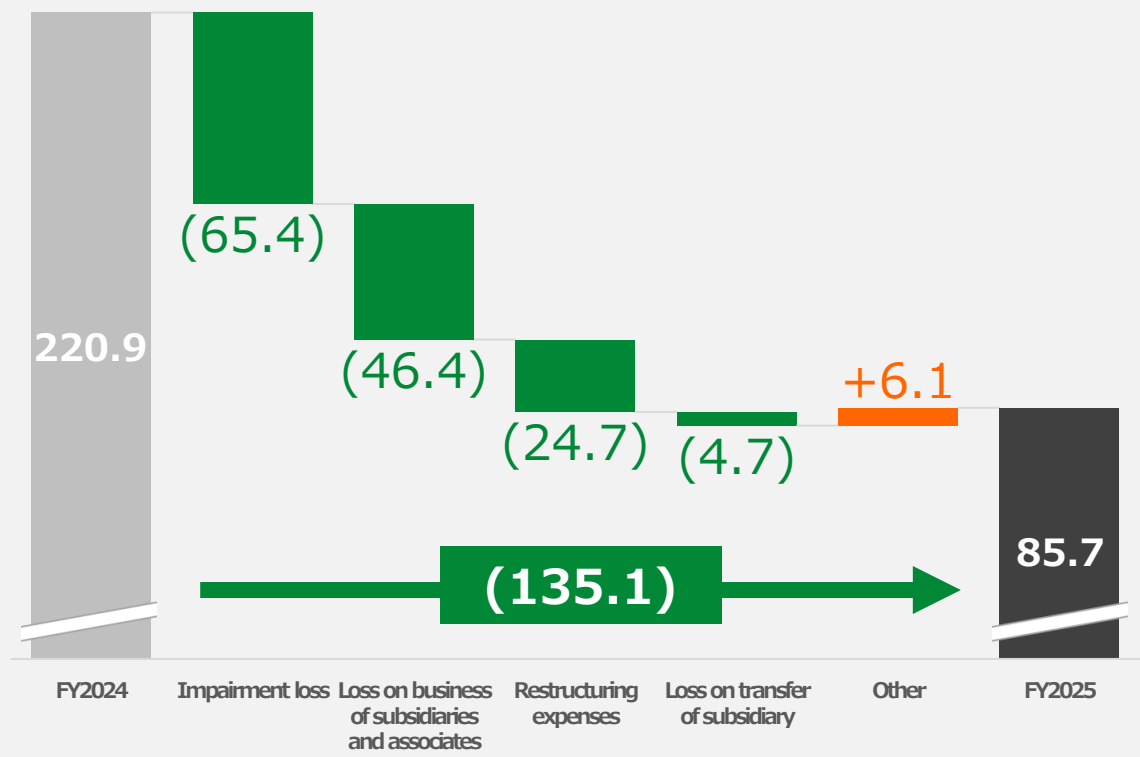
Billions of yen



Special losses

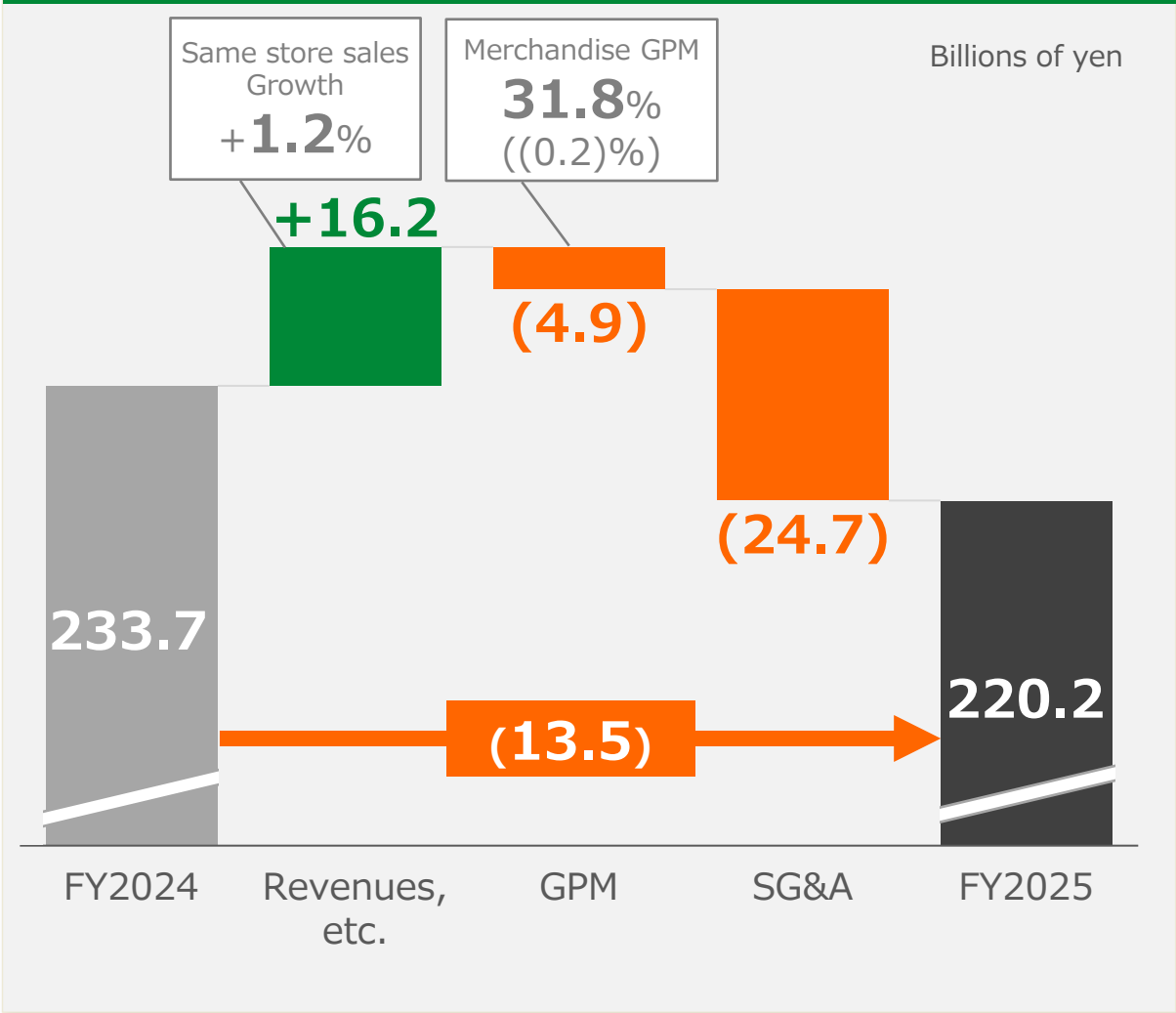
- ✓ YoY 38.8%/change (135.1)
- ✓ Decreased significantly through Group's Structure Reforms implemented up to the previous year

Billions of yen

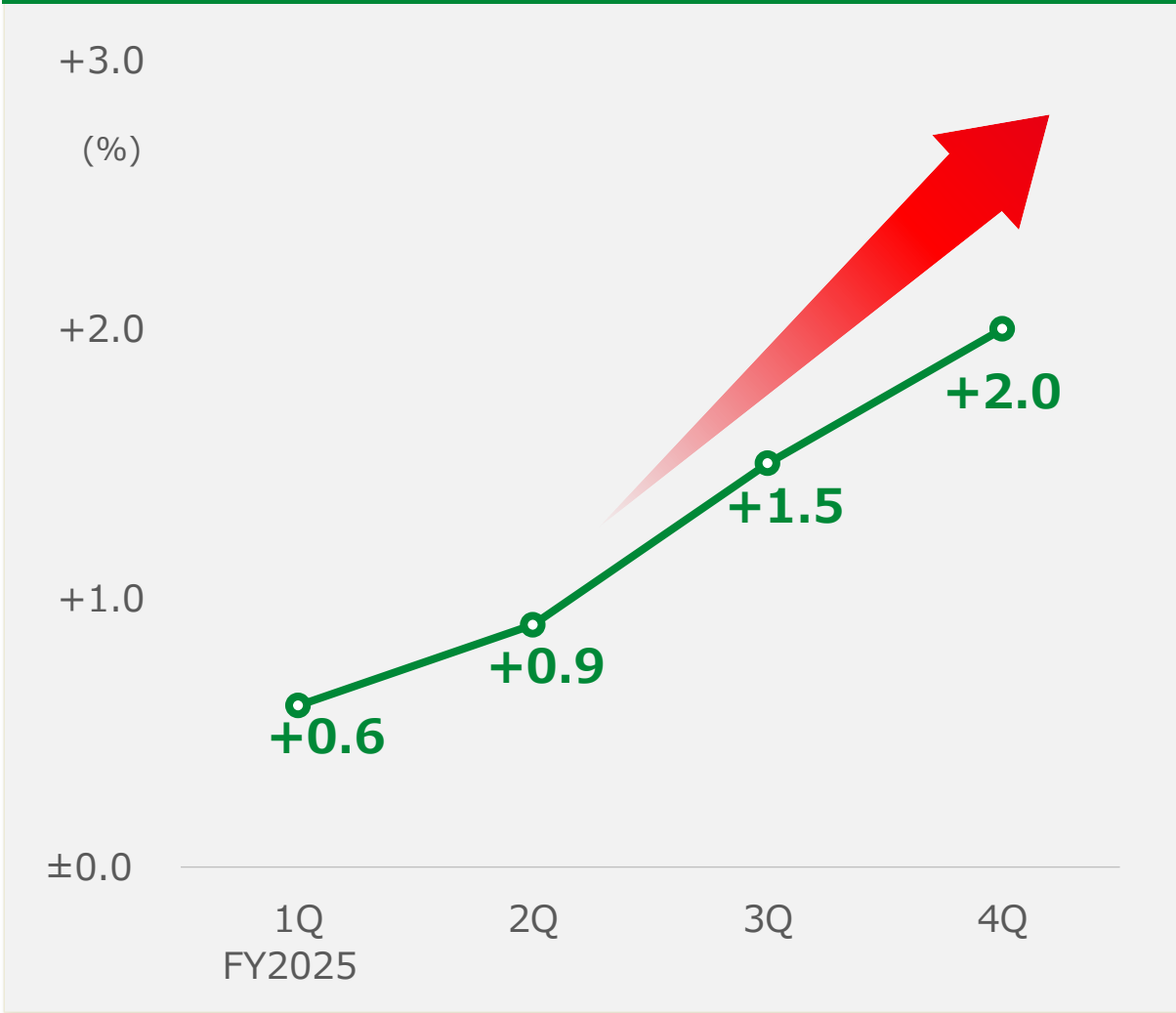


FY2025 Results (SEJ)

Operating income and major KPIs

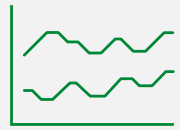


Same store sales trend



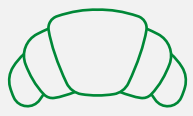
Progress of Initiatives (SEJ)

Fresh food differentiation



APSD of just-made counter merchandise

+8.3%



Number of stores introducing SEVEN CAFÉ Bakery

Approx. **8,000** Stores



Number of stores introducing SEVEN CAFÉ Tea

Approx. **2,000** Stores

Store Network/7NOW/Cost Structure Reform



Store net increase

170 Stores



7NOW Total sales growth

+28.2%

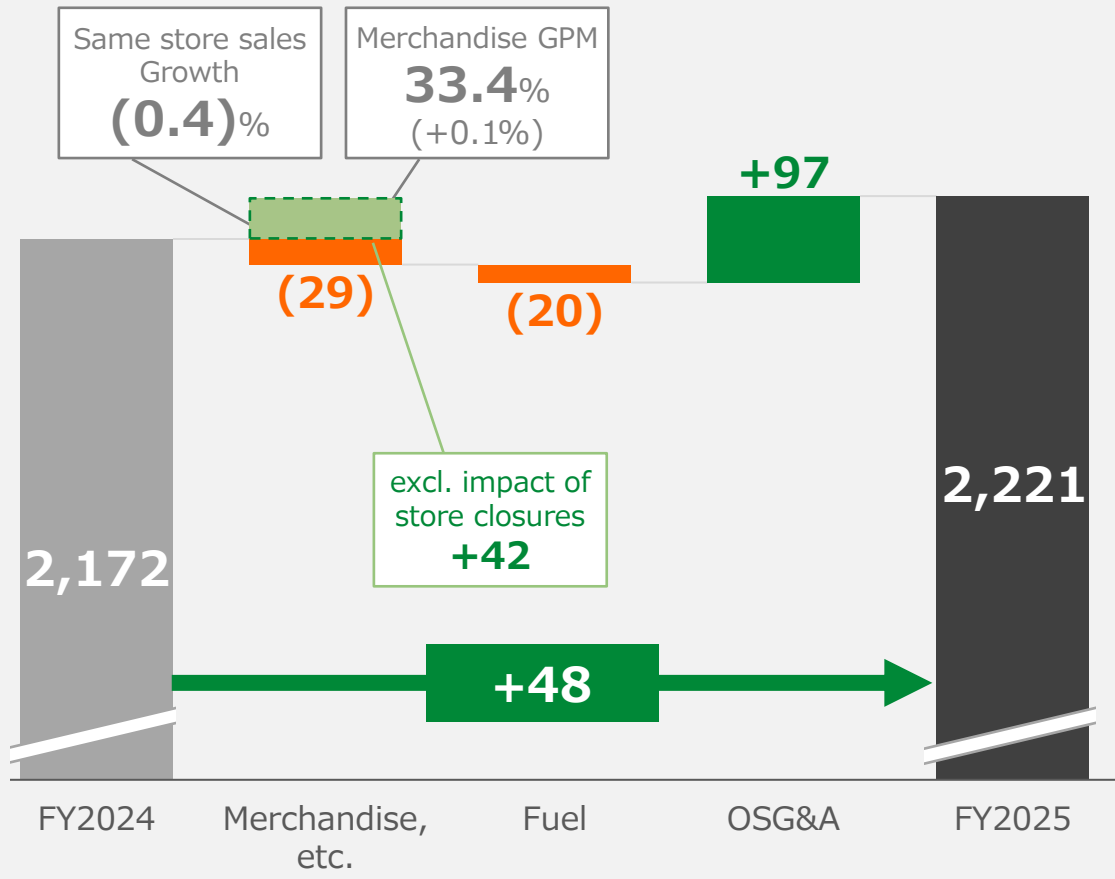


**Transformation Plan:
Accelerate Execution**

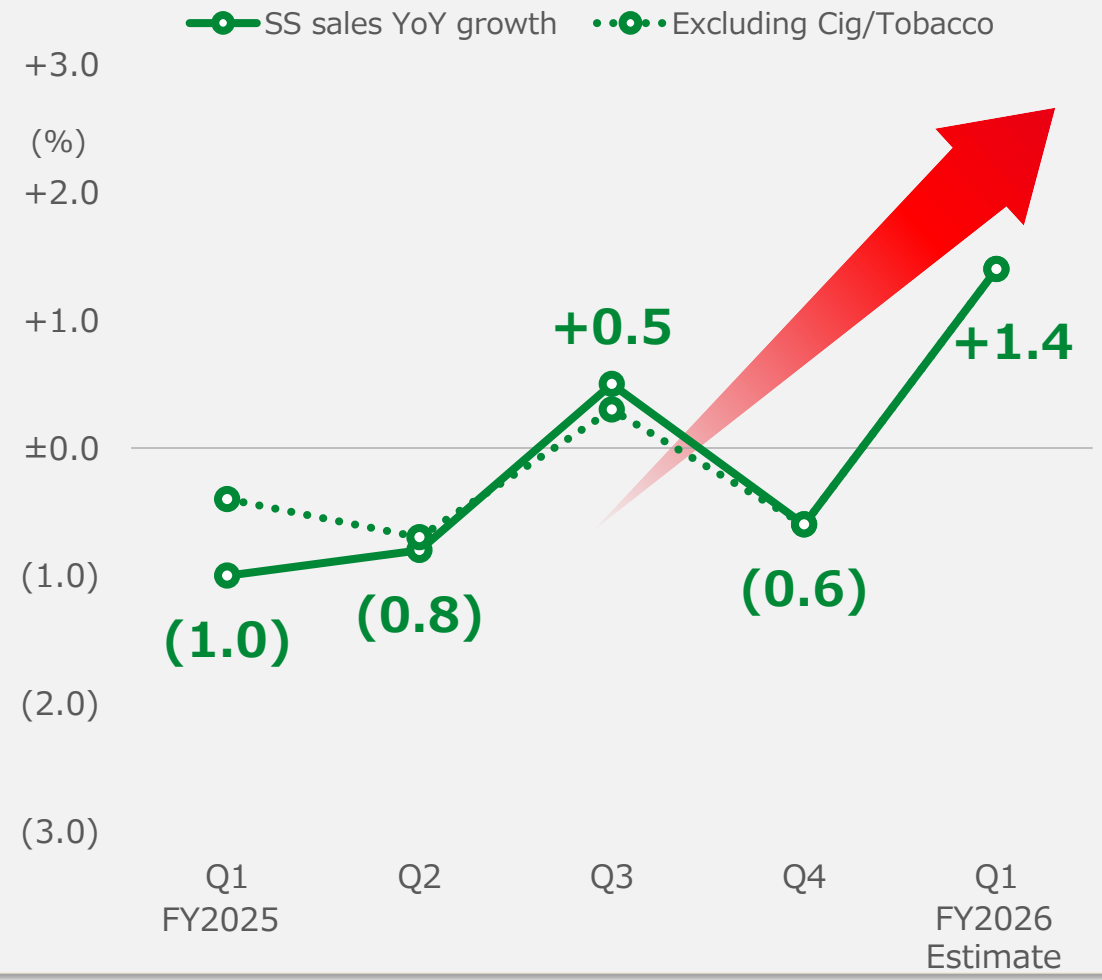
FY2025 Results (SEI)

Operating income and major KPIs

Millions of dollar



Same store sales trend



Progress of Initiatives (SEI)

Fresh Food/PB/Store Network



Restaurant openings

30 Stores



Private brands
Launching new item

175 Items



New store openings

122 Stores

7NOW/Fuel/Cost Control



7NOW sales

\$979M



Fuel Vertical Integration
Opportunities (EBITDA)

Approx. **\$70**M



OSG&A YoY (Dollar basis)

99.0%

AGENDA

1 FY2025 Results

2 FY2026 Forecasts

FY2026 Consolidated Financial Forecasts

- ✓ Plan to achieve higher sales and higher income on a basis excluding the impact of deconsolidation
- ✓ CVS businesses in Japan and the U.S. maintain a steady income growth trend

Billions of yen

| | FY2025 Like for like ^{*1} | FY2026 plan | vs. FY2025 Like for like |
|------------------------------------------------------------|---------------------------------------|----------------|-----------------------------|
| Convenience store group merchandise sales ^{*2} | 9,768.6 | 10,030.0 | 102.7% |
| EBITDA | 866.8 | 891.0 | 102.8% |
| Operating Income | 384.6 | 405.0 | 105.3% |
| Net Income | 254.8 | 270.0 | 105.9% |
| EPS | 103.43 yen | 117.42 yen | 113.5% |

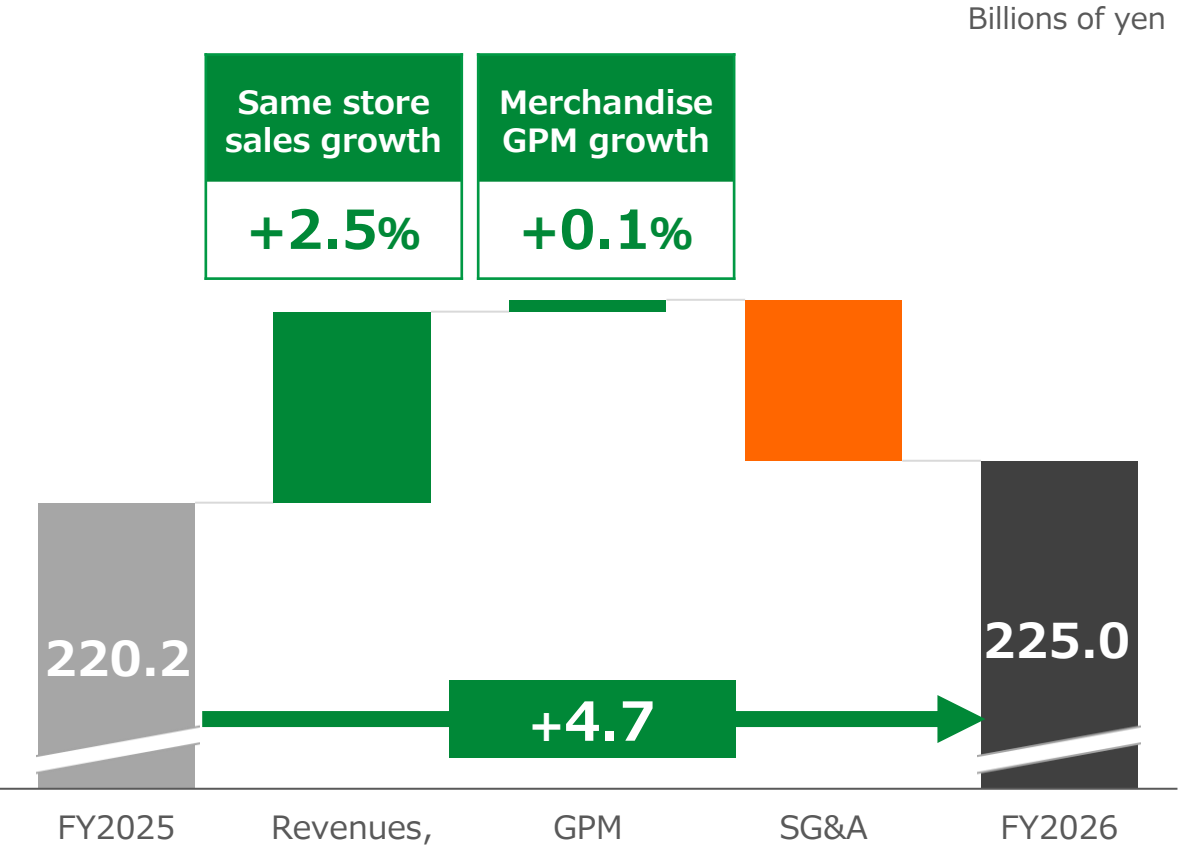
^{*1} Reflect the impact of deconsolidation of York HD and Seven Bank ^{*2} Include merchandise sales from directly operated stores and franchised stores across consolidated convenience store subsidiaries

Notes) 1. Exchange rate: 1USD=150.00JPY, 1CNY=21.00JPY 2. EPS reflects the estimated impact of future share buybacks

FY2026 Operating Income and Initiatives (SEJ)

Accelerating customer value through disciplined investments

Operating income and major KPIs



Accelerating priority execution

Quality: Elevating Customer Experience

Just-made Expansion
Rolled out under the "Live-Meal" brand

Category Strategy
Product offerings tailored to consumption occasions

Value: Strengthening Profit Structure

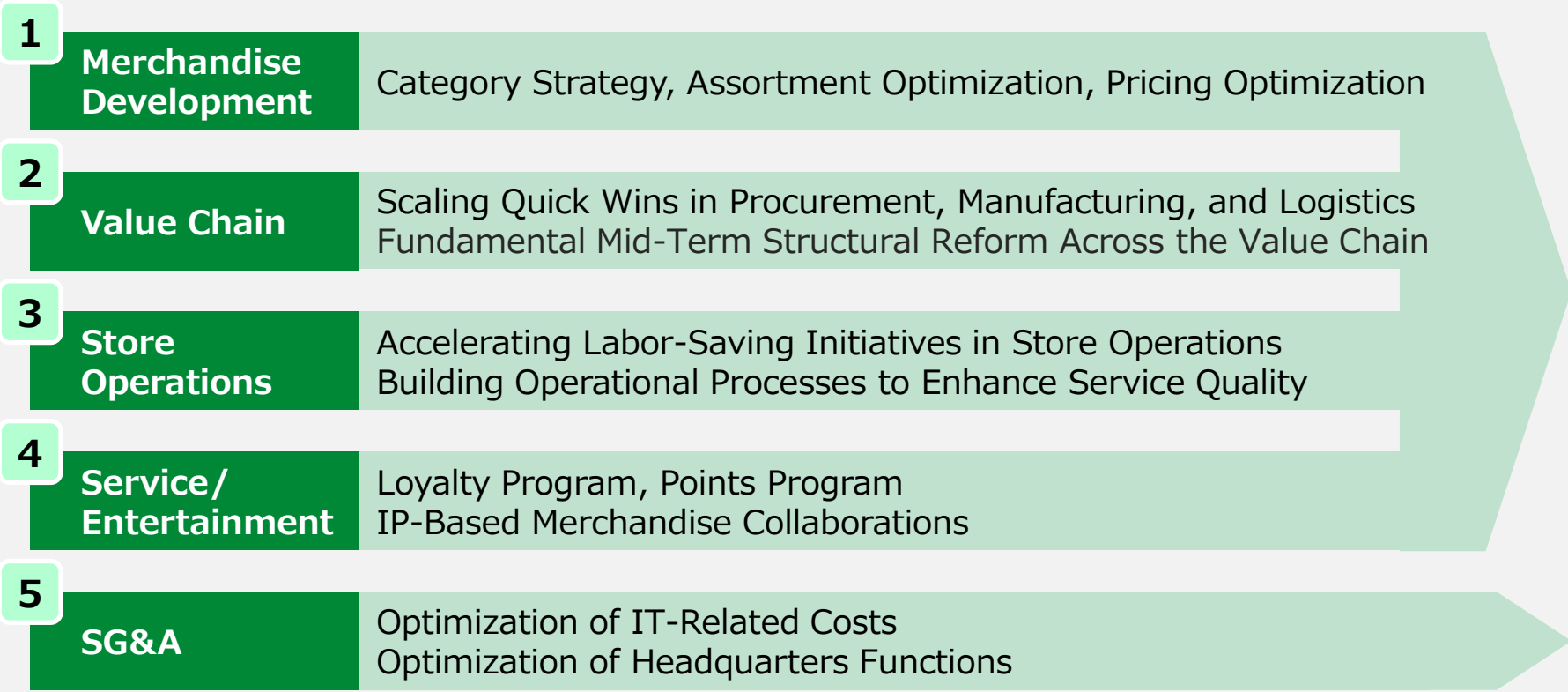
Value Chain Optimization
Reforms across procurement, manufacturing, and logistics

Cost Management
Fundamental review of operational processes
Review of IT/system utilization

Creating a Robust Foundation for Sustainable Profitable Growth

Transformation Plan: Accelerate Execution

- Five Domains Driving Transformation -



Driving Sales and Gross Profit Growth

Controlling SG&A Ratio Below 12%

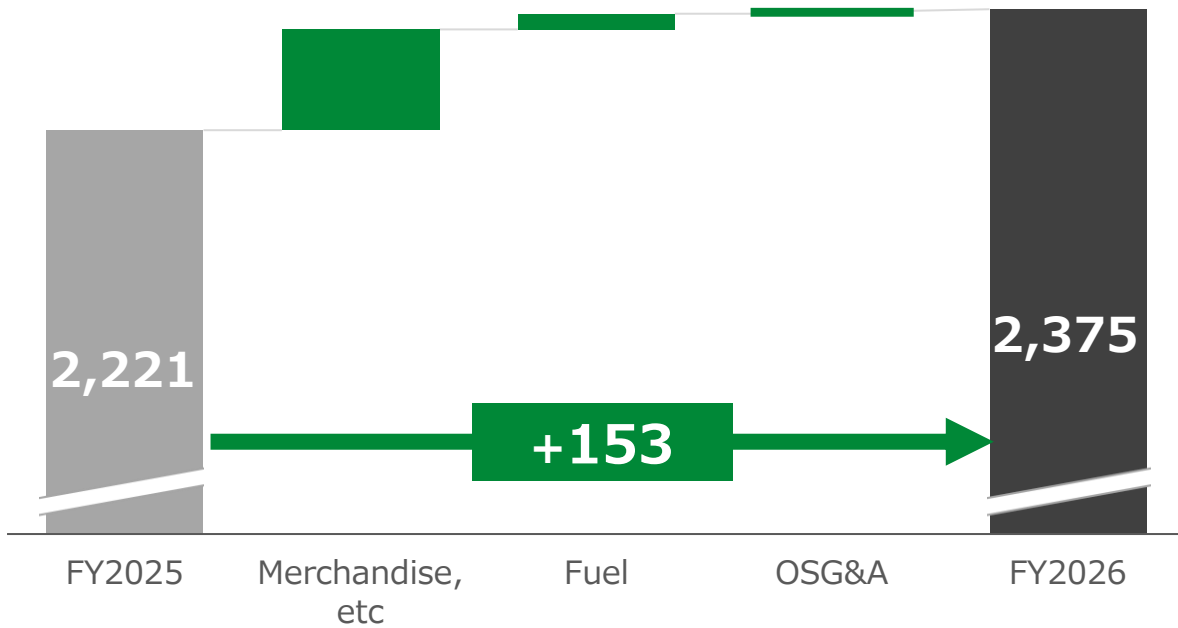
FY2026 Operating Income and Initiatives (SEI)

Steady Profit Growth Through Expanding Gross Profit and Rigorous OSG&A Control

Operating income and major KPIs

Millions of dollar

| | |
|------------------------------|------------------------|
| Same store sales growth (US) | Merchandise GPM growth |
| +2.0% | +0.4% |



Accelerating priority execution



Quality: Elevating Customer Experience

Expansion of Proprietary Products
 Deliver High-Quality Fresh Food and Beverages

Store Network Optimization
 Store Upgrades
 Expansion of Franchise Model



Value: Strengthening Profit Structure

Value Chain Optimization
 Redesign Value Chain Network to Enhance Cost Competitiveness

Cost Management
 Service-Level Improvement through Simplification of Store Operations

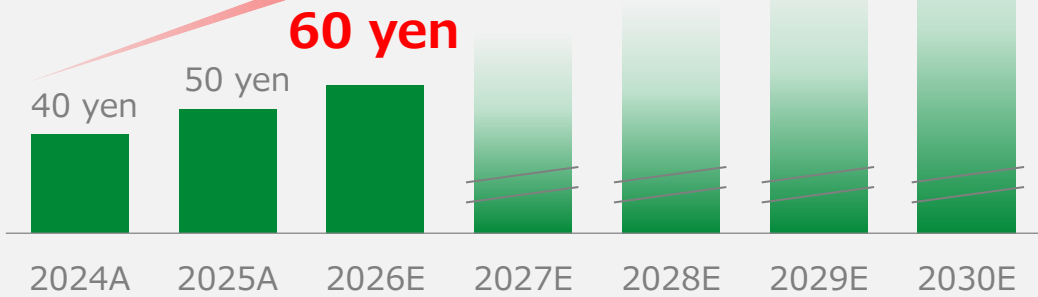
Shareholder Return

Shareholder Return Policy Remains Unchanged,
while Revising the Earliest Timing for the SEI IPO to FY2027



Progressive dividend

FY2026
dividends forecast



Continued improvement in dividends per share

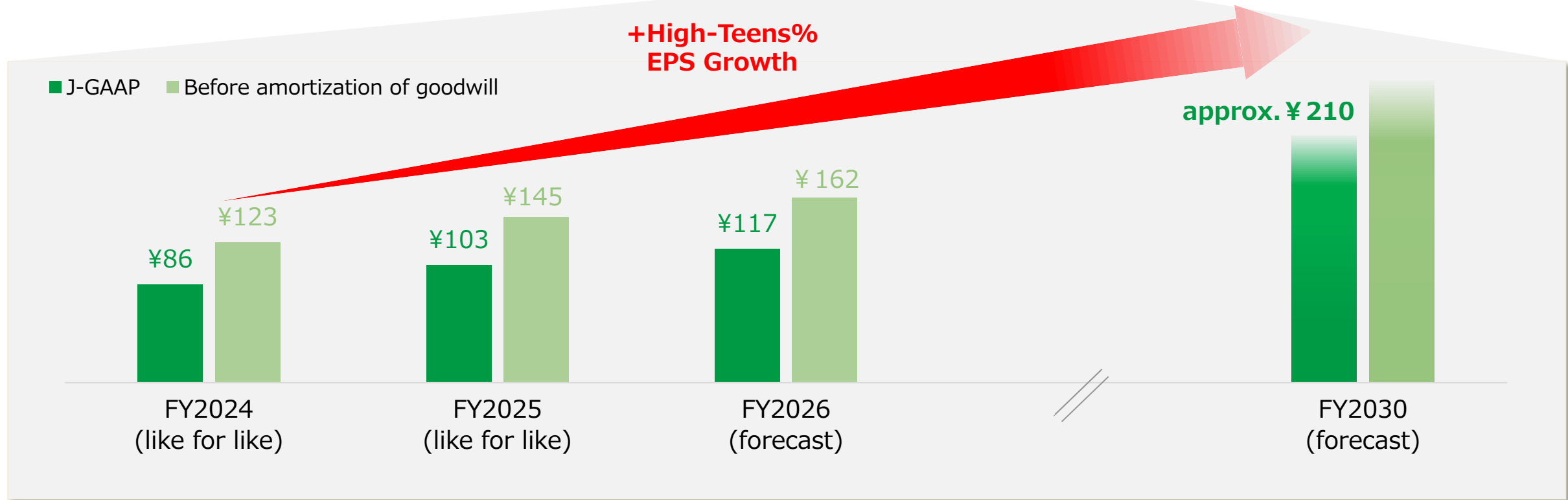
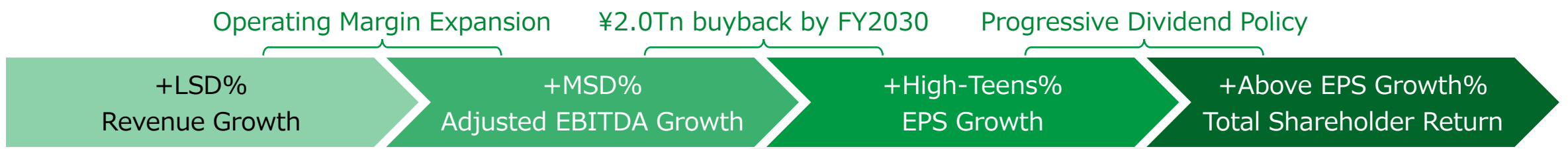


Share buyback

Planned share buyback totaling
¥2.0Tn through FY2030
(¥0.6Tn completed in FY2025)

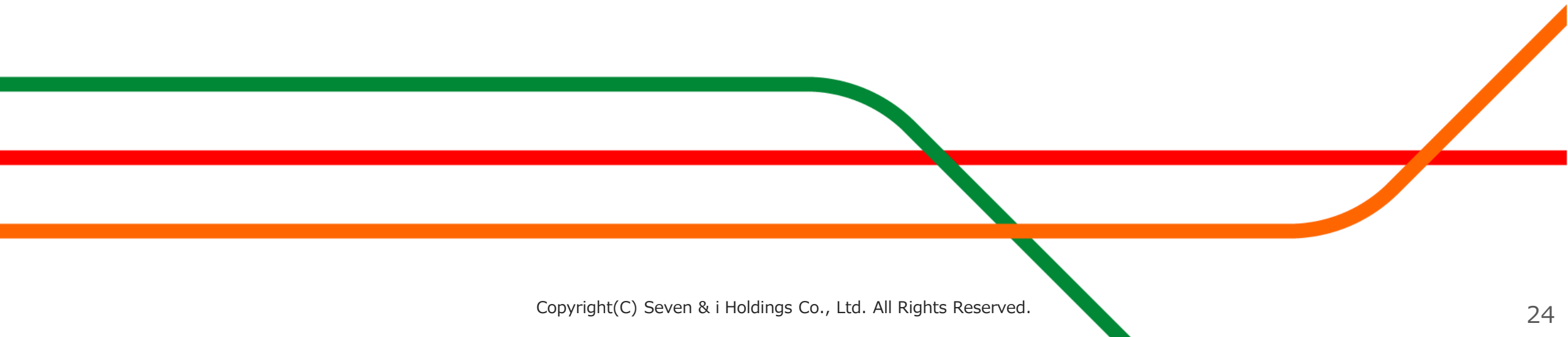
Continuous EPS Growth / Value Creation *

Continuous EPS Growth and Shareholder Value Creation through Steady Business Growth and Continuous Improvement on Asset Efficiency



* Inclusive of the sale of Superstore Business Group, deconsolidation of Seven Bank and IPO of SEI

Appendix



Consolidated B/S Summary (As of February 28, 2026)

| | | | | (Billions of yen) | | | |
|---------------------------------------------------------------|------------------------|------------------------|-----------|-----------------------------------------------------------------------|------------------------|------------------------|-----------|
| Assets (Main items only) | As of Feb. 28, 2025 | As of Feb. 28, 2026 | Change | Liabilities and net assets (Main items only) | As of Feb. 28, 2025 | As of Feb. 28, 2026 | Change |
| Current assets | 2,823.7 | 1,492.5 | (1,331.2) | Total liabilities | 7,162.8 | 5,494.7 | (1,668.1) |
| Cash and bank deposits | 1,368.6 | 438.6 | (930.0) | Current liabilities | 3,316.6 | 1,900.6 | (1,415.9) |
| Cash and bank deposits at Seven Bank | 903.1 | - | (903.1) | Notes and accounts payable, trade | 519.4 | 416.0 | (103.4) |
| Notes and accounts receivable - trade, and contract assets | 441.6 | 298.6 | (142.9) | Short-term loans | 172.4 | 135.5 | (36.9) |
| Merchandise and finished goods | 312.7 | 223.0 | (89.7) | Current portion of bonds and current portion of long-term loans | 500.1 | 446.1 | (54.0) |
| Non-current assets | 8,561.7 | 7,650.0 | (911.7) | Allowance for loss on business of subsidiaries and associates | 18.2 | 3.2 | (14.9) |
| Property and equipment | 4,981.2 | 4,497.9 | (483.3) | Lease obligations | 180.6 | 164.7 | (15.8) |
| Buildings and structures, net | 1,749.1 | 1,449.7 | (299.3) | Deposits received in banking business | 813.3 | - | (813.3) |
| Land | 1,172.5 | 902.2 | (270.3) | Non-current liabilities | 3,846.2 | 3,594.0 | (252.1) |
| Right-of-use assets, net | 1,289.8 | 1,451.6 | +161.8 | Bonds | 1,244.0 | 929.8 | (314.2) |
| Intangible assets | 2,711.3 | 2,469.0 | (242.3) | Long-term loans | 778.0 | 718.4 | (59.5) |
| Investments and other assets | 869.0 | 683.0 | (186.0) | Lease obligations | 1,223.4 | 1,398.9 | +175.5 |
| Deferred assets | 0.58 | 0.39 | (0.18) | Total net assets | 4,223.2 | 3,648.1 | (575.0) |
| Total assets | 11,386.1 | 9,142.9 | (2,243.1) | Total liabilities and net assets | 11,386.1 | 9,142.9 | (2,243.1) |

Note) "Accounting Standard for Current Income Taxes" (ASBJ Statement No. 27, October 28, 2022), etc. have been applied from the beginning of the fiscal year ended February 28, 2026, and the figures for the fiscal year ended February 28, 2025 have been modified retrospectively.

FY2025 Consolidated Results Highlight

(Billions of yen, %)

| | FY2024 | FY2025 | YoY | Change | vs. Plan | Change |
|---------------------------------------------------------|----------|----------|-------|-----------|----------|---------|
| Group's total sales* ¹ | 18,442.8 | 16,992.0 | 92.1 | (1,450.7) | 99.5 | (93.9) |
| Revenues from operations | 11,972.7 | 10,430.2 | 87.1 | (1,542.4) | 98.8 | (129.7) |
| Operating income | 420.9 | 422.9 | 100.5 | +2.0 | 104.7 | +18.9 |
| Ordinary income | 374.5 | 377.4 | 100.8 | +2.8 | 103.1 | +11.4 |
| Special gains | 115.7 | 142.9 | 123.5 | +27.2 | 126.0 | +29.5 |
| Special losses | 220.9 | 85.7 | 38.8 | (135.1) | 131.1 | +20.3 |
| Net income attributable to owners of parent | 173.0 | 292.7 | 169.2 | +119.6 | 108.4 | +22.7 |
| Amortization of goodwill | 137.9 | 137.8 | 100.0 | (0.04) | 101.4 | +1.8 |
| EPS (yen) | 66.62 | 118.81 | 178.3 | +52.19 | 108.4 | +9.24 |
| EPS before amortization of goodwill (yen)* ² | 105.12 | 161.74 | 153.9 | +56.62 | 106.5 | +9.87 |
| EBITDA | 995.5 | 942.8 | 94.7 | (52.6) | 102.2 | +20.3 |

*1 Group's total sales include the sales of franchisees of Seven-Eleven Japan, Seven-Eleven Okinawa, 7-Eleven, Inc. and 7-Eleven Stores Pty Ltd.

*2 Tax impact related to amortization of goodwill is taken into account.

Note) Exchange rate: 1USD=149.61JPY, 1CNY=20.81JPY

FY2025 Revenues from Operations, Operating Income and EBITDA by Operating Segment (YoY)



(Billions of yen, %)

| | Revenues from operations | | Operating income | | EBITDA | |
|-------------------------|--------------------------|-------------------|------------------|----------------|--------|----------------|
| | | YoY/Change | | YoY/Change | | YoY/Change |
| Consolidated | 10,430.2 | 87.1 (1,542.4) | 422.9 | 100.5 +2.0 | 942.8 | 94.7 (52.6) |
| Domestic CVS operations | 914.5 | 101.2 +10.4 | 222.5 | 95.3 (11.0) | 314.0 | 96.7 (10.8) |
| Overseas CVS operations | 8,556.8 | 93.3 (613.9) | 222.2 | 102.8 +5.9 | 581.8 | 99.0 (5.9) |
| Superstore operations | 689.4 | 48.1 (742.6) | 17.5 | 168.2 +7.0 | 36.1 | 69.4 (15.9) |
| Financial services | 137.1 | 64.7 (74.9) | 20.9 | 65.5 (11.0) | 45.6 | 63.1 (26.7) |
| Others | 179.7 | 56.0 (141.1) | 6.9 | 120.8 +1.2 | 10.6 | 84.6 (1.9) |
| Eliminations/Corporate | (47.5) | - +19.8 | (67.2) | - +9.8 | (45.5) | - +8.8 |

Note) Exchange rate: 1USD=149.61JPY, 1CNY=20.81JPY

FY2025 Revenues from Operations, Operating Income and EBITDA by Operating Segment (vs. Plan)

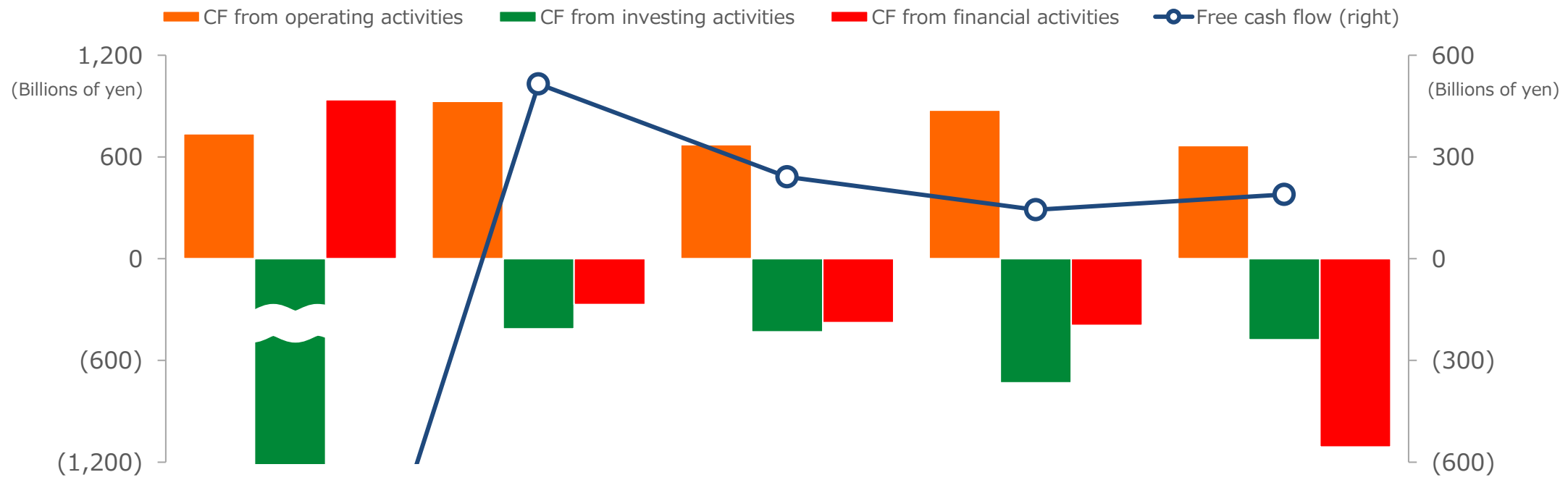


(Billions of yen, %)

| | Revenues from operations | | Operating income | | EBITDA | |
|-------------------------|--------------------------|-----------------|------------------|-----------------|--------|-----------------|
| | | vs. Plan/Change | | vs. Plan/Change | | vs. Plan/Change |
| Consolidated | 10,430.2 | 98.8 (129.7) | 422.9 | 104.7 +18.9 | 942.8 | 102.2 +20.3 |
| Domestic CVS operations | 914.5 | 100.5 +4.5 | 222.5 | 103.6 +7.8 | 314.0 | 102.5 +7.6 |
| Overseas CVS operations | 8,556.8 | 98.3 (145.1) | 222.2 | 96.6 (7.7) | 581.8 | 99.3 (3.8) |
| Superstore operations | 689.4 | 100.0 ±0.0 | 17.5 | 98.9 (0.19) | 36.1 | 99.5 (0.19) |
| Financial services | 137.1 | 105.5 +7.1 | 20.9 | 104.3 +0.87 | 45.6 | 96.5 (1.6) |
| Others | 179.7 | 102.1 +3.7 | 6.9 | 98.3 (0.12) | 10.6 | 98.8 (0.12) |
| Eliminations/Corporate | (47.5) | - (0.06) | (67.2) | - +18.3 | (45.5) | - +18.6 |

Note) Exchange rate: 1USD=149.61JPY, 1CNY=20.81JPY

Consolidated Statements of Cash Flows



| (Billions of yen) | FY2021 | FY2022 | FY2023 | FY2024 | FY2025 | vs. FY2024 |
|----------------------------------------------------|-----------|---------|---------|---------|-----------|------------|
| CF from operating activities | 736.4 | 928.4 | 673.0 | 876.4 | 666.7 | (209.7) |
| CF from investing activities | (2,505.5) | (413.2) | (431.8) | (732.3) | (477.3) | +255.0 |
| Free cash flow | (1,769.0) | 515.2 | 241.2 | 144.0 | 189.3 | +45.2 |
| CF from financing activities | 937.0 | (270.3) | (377.0) | (392.6) | (1,109.8) | (717.2) |
| Cash and cash equivalents at the end of the period | 1,414.8 | 1,674.7 | 1,562.4 | 1,349.8 | 426.1 | (923.6) |

Seven-Eleven Japan (1) B/S Summary (As of February 28, 2026)

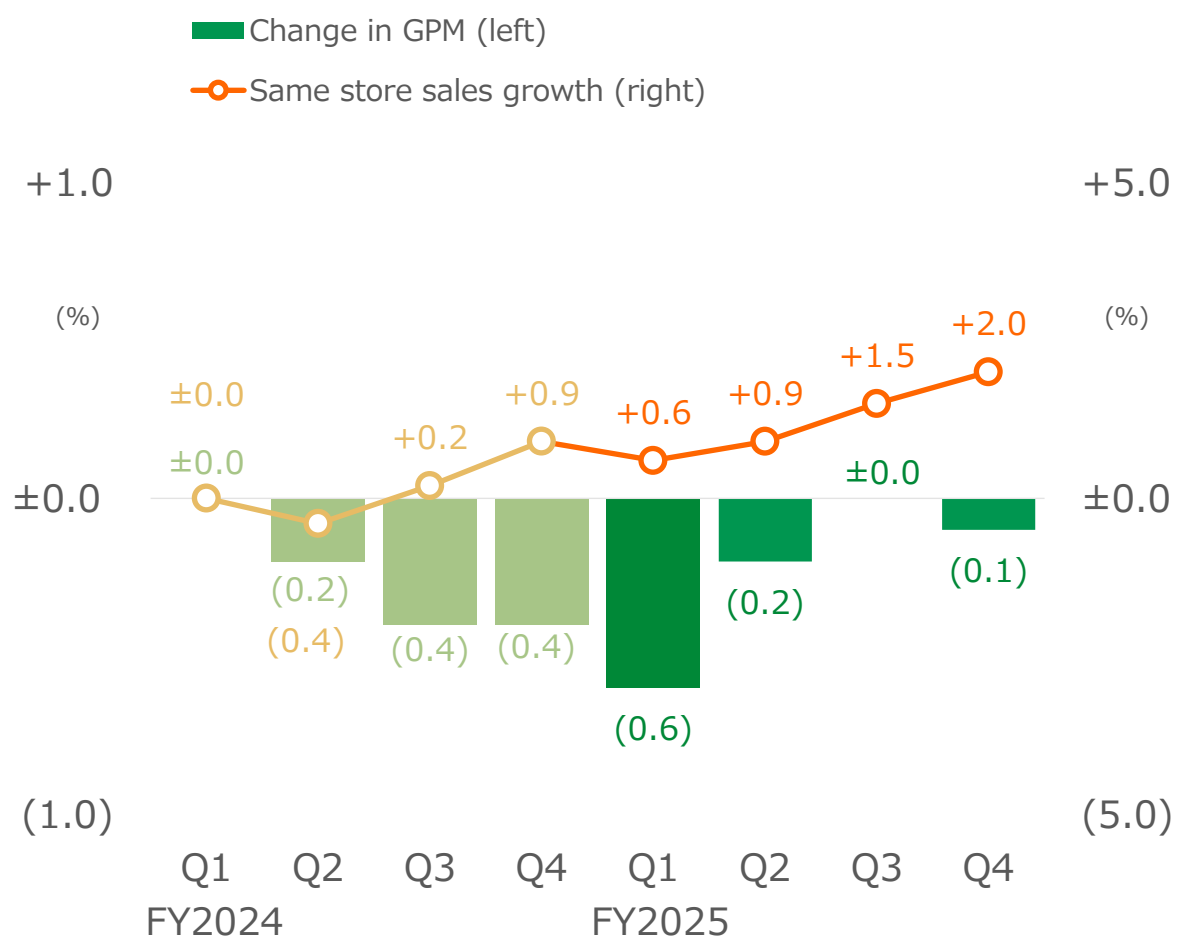


(Billions of yen)

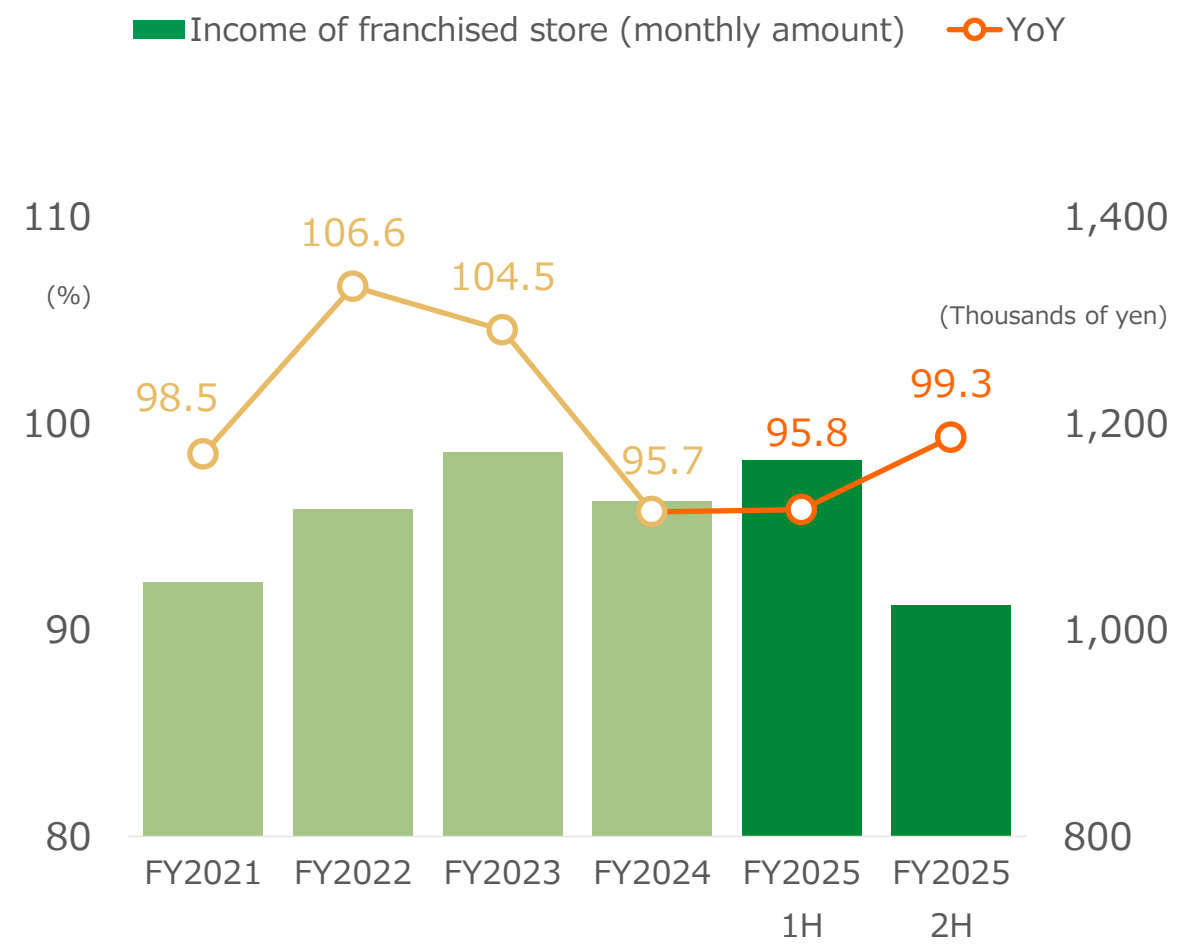
| Assets | As of Feb. 28, 2025 | As of Feb. 28, 2026 | Change | Liabilities | As of Feb. 28, 2025 | As of Feb. 28, 2026 | Change |
|----------------------------------------------|------------------------|------------------------|--------|----------------------------------------------------|------------------------|------------------------|--------|
| Current assets | 724.4 | 795.1 | +70.7 | Total liabilities | 590.8 | 628.6 | +37.8 |
| Cash and bank deposits | 50.0 | 83.2 | +33.1 | Current liabilities | 491.2 | 512.8 | +21.5 |
| Deposits held by subsidiaries and affiliates | 430.5 | 445.6 | +15.0 | Accounts payable, trade | 191.9 | 193.4 | +1.4 |
| Accounts receivable, other | 190.9 | 208.7 | +17.7 | Accounts payable, other and accrued expenses | 50.5 | 54.5 | +3.9 |
| Other current assets | 52.8 | 57.5 | +4.7 | Accounts payable to parent company | 52.3 | 18.5 | (33.7) |
| Non-current assets | 1,550.8 | 1,568.6 | +17.7 | Deposits received | 143.8 | 185.5 | +41.6 |
| Buildings and structures | 467.4 | 471.7 | +4.2 | Other current liabilities | 52.4 | 60.7 | +8.2 |
| Land | 113.7 | 115.8 | +2.1 | Non-current liabilities | 99.5 | 115.8 | +16.2 |
| Intangible assets | 107.1 | 119.1 | +11.9 | Guarantee deposits received from franchised stores | 10.8 | 11.1 | +0.29 |
| Investments and other assets | 862.5 | 861.9 | (0.60) | Asset retirement obligations | 83.4 | 95.2 | +11.7 |
| Total assets | 2,275.3 | 2,363.8 | +88.5 | Other non-current liabilities | 5.2 | 9.4 | +4.1 |
| | | | | Total net assets | 1,684.5 | 1,735.2 | +50.6 |
| | | | | Total liabilities and net assets | 2,275.3 | 2,363.8 | +88.5 |

Seven-Eleven Japan (2)

Same store sales & GPM



Trend in income of franchised stores



Seven-Eleven Japan (3)

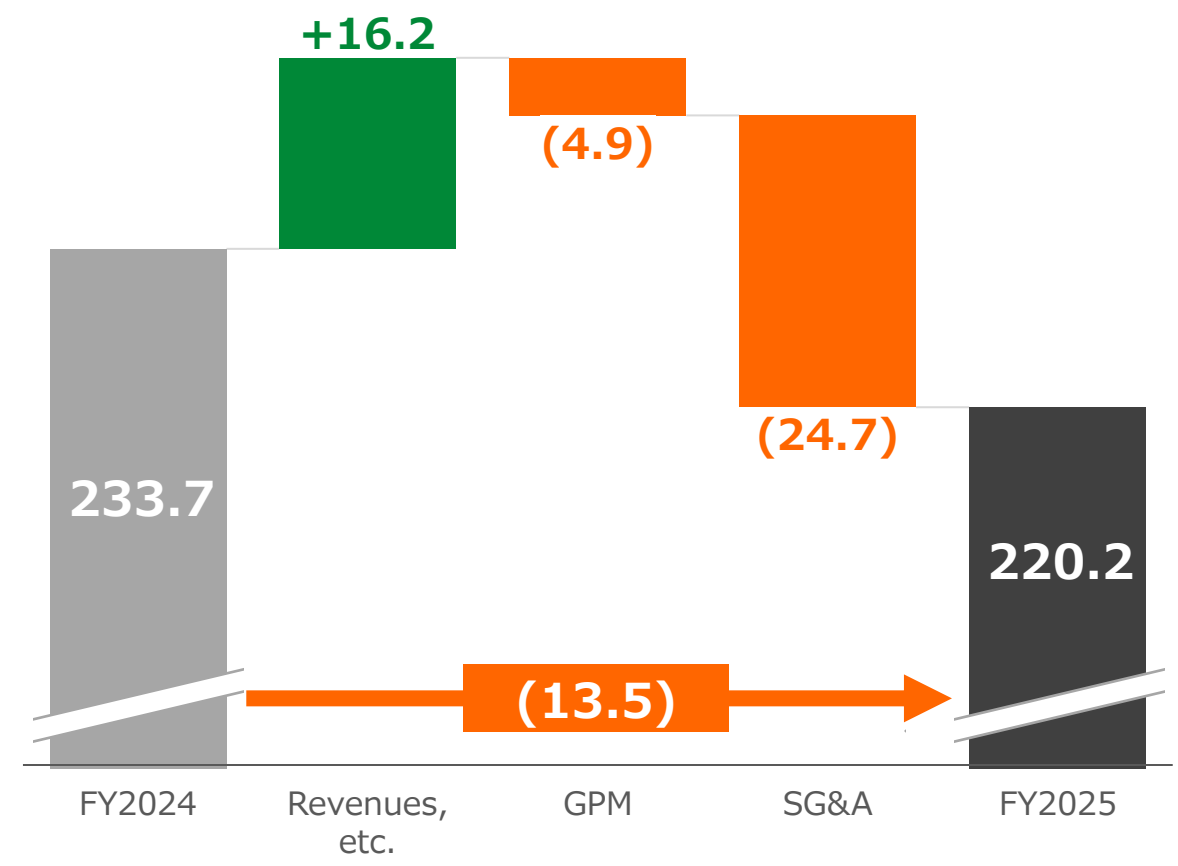
SG&A

(Billions of yen, %)

| | FY2025 | | | Major factors for change |
|-------------------------------|--------|-------|------------|-------------------------------------------------------------------------------------|
| | | YoY | YoY change | |
| SG&A | 634.4 | 104.1 | +24.7 | |
| Advertising expenses | 44.3 | 116.6 | +6.3 | Increase due to sales promotion enhancement and ads cost |
| Salaries and wages | 79.3 | 100.6 | +0.50 | Impact of increased salary unit cost |
| Land and building rent | 204.3 | 102.3 | +4.6 | Increased number of stores |
| Depreciation and amortization | 89.7 | 100.1 | +0.06 | Flat with next-gen system offsetting the end of 7 th system depreciation |
| Utility expenses | 65.3 | 100.5 | +0.34 | Increased electric cost |
| Others | 151.3 | 109.2 | +12.8 | Increased system expenses and maintenance fee |

Change in operating income

(Billions of yen)



7-Eleven, Inc. (1) B/S Summary (As of December 31, 2025)



(Millions of dollar)

| Assets | As of Dec. 31, 2024 | As of Dec. 31, 2025 | Change | Liabilities | As of Dec. 31, 2024 | As of Dec. 31, 2025 | Change |
|--------------------------------|------------------------|------------------------|--------|----------------------------------------------------|------------------------|------------------------|---------|
| Current assets | 4,009 | 4,327 | +318 | Total liabilities | 24,817 | 24,873 | +56 |
| Cash and cash equivalents | 742 | 1,032 | +290 | Current liabilities | 5,803 | 4,291 | (1,512) |
| Accounts receivable | 1,422 | 1,474 | +52 | Trade and accounts payable | 1,113 | 988 | (125) |
| Inventories | 1,384 | 1,302 | (82) | Accrued expenses and other current liabilities | 1,986 | 2,106 | +120 |
| Others | 461 | 519 | +58 | Operating lease obligations due within one year | 875 | 889 | +14 |
| Non-current assets | 42,281 | 43,334 | +1,053 | Debt due within one year*1 | 1,829 | 308 | (1,521) |
| Operating lease assets | 7,097 | 8,256 | +1,159 | Non-current liabilities | 19,014 | 20,582 | +1,568 |
| Property and equipment | 15,124 | 14,953 | (171) | Operating lease obligations | 6,612 | 7,810 | +1,198 |
| Goodwill and Intangible Assets | 18,632 | 18,664 | +32 | Long-term debt*2 | 8,147 | 8,371 | +224 |
| Other assets | 1,428 | 1,461 | +33 | Deferred credits and other liabilities | 4,255 | 4,401 | +146 |
| Total assets | 46,290 | 47,661 | +1,371 | Total net assets | 21,473 | 22,788 | +1,315 |
| | | | | Total liabilities and net assets | 46,290 | 47,661 | +1,371 |

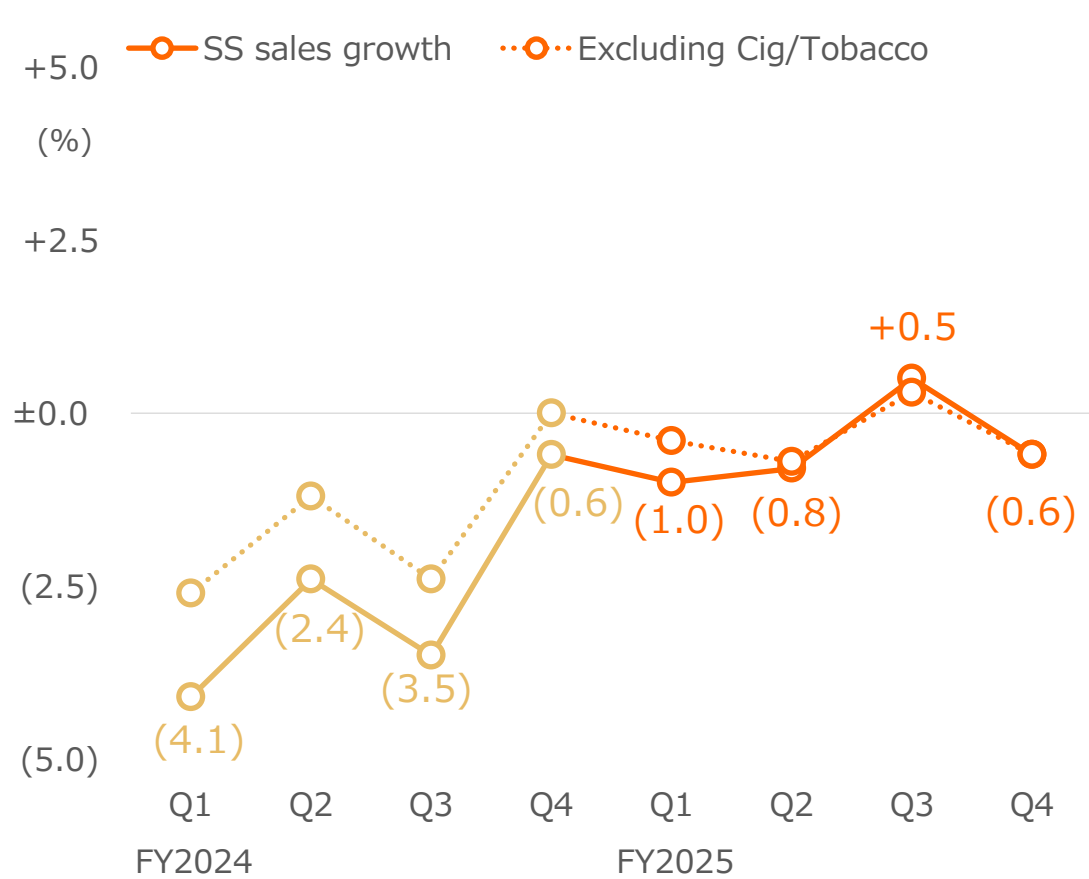
Note) Figures are shown on SEI consolidated basis in accordance with U.S. GAAP.

*1 Debt due within one year includes term loans, financing leases, and other items.

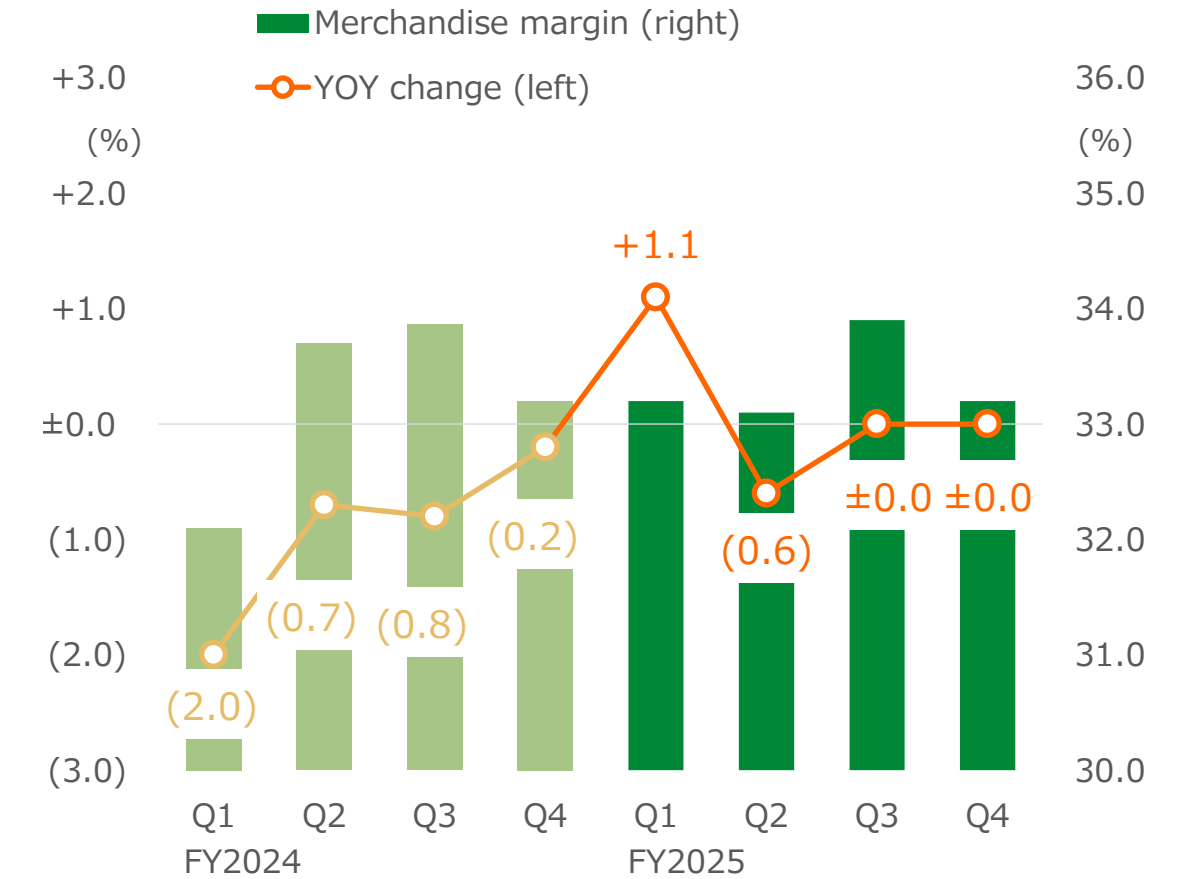
*2 Long-term debt includes senior unsecured notes, term loans, financing leases, and other items.

7-Eleven, Inc. (2)

Merchandise same store sales growth

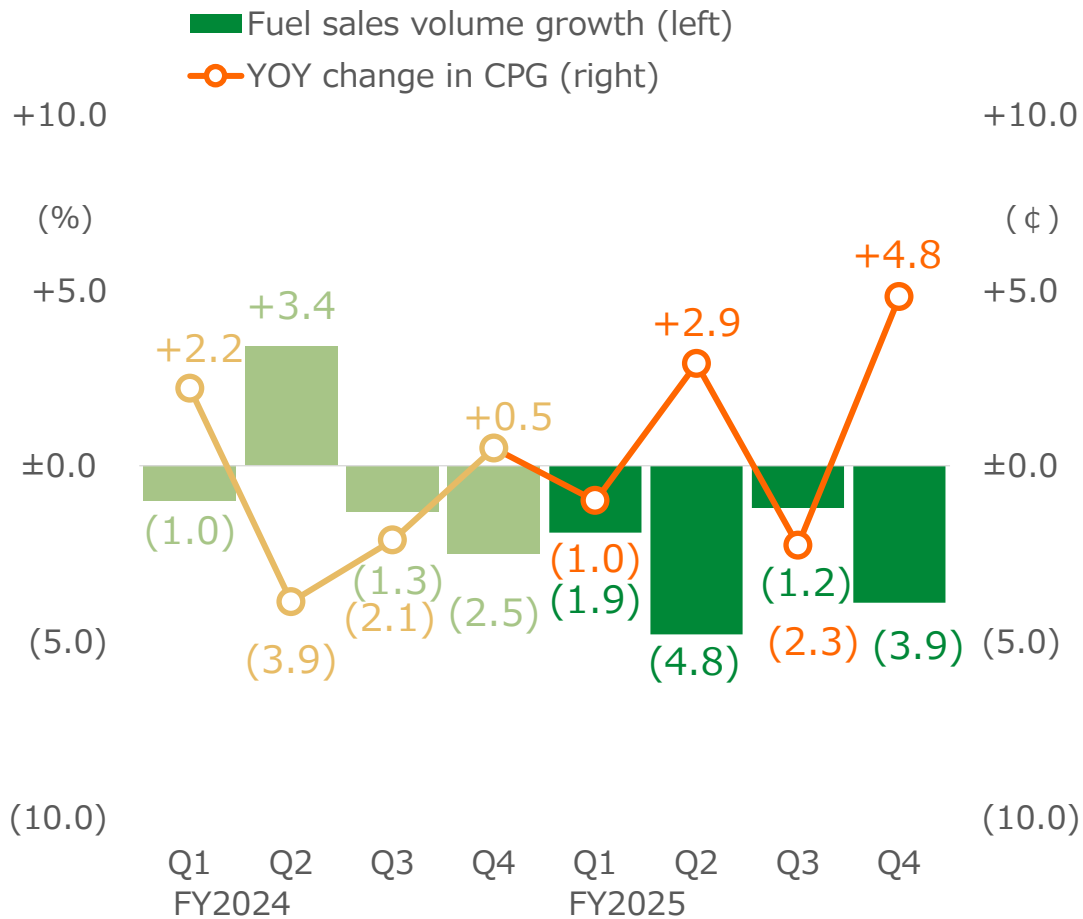


Merchandise gross profit margin



7-Eleven, Inc. (3)

Total fuel volume & margin (Total CPG*)



Fuel gross profit



* Total CPG is inclusive of Retail, Supply and Wholesale business

7-Eleven, Inc. (4)

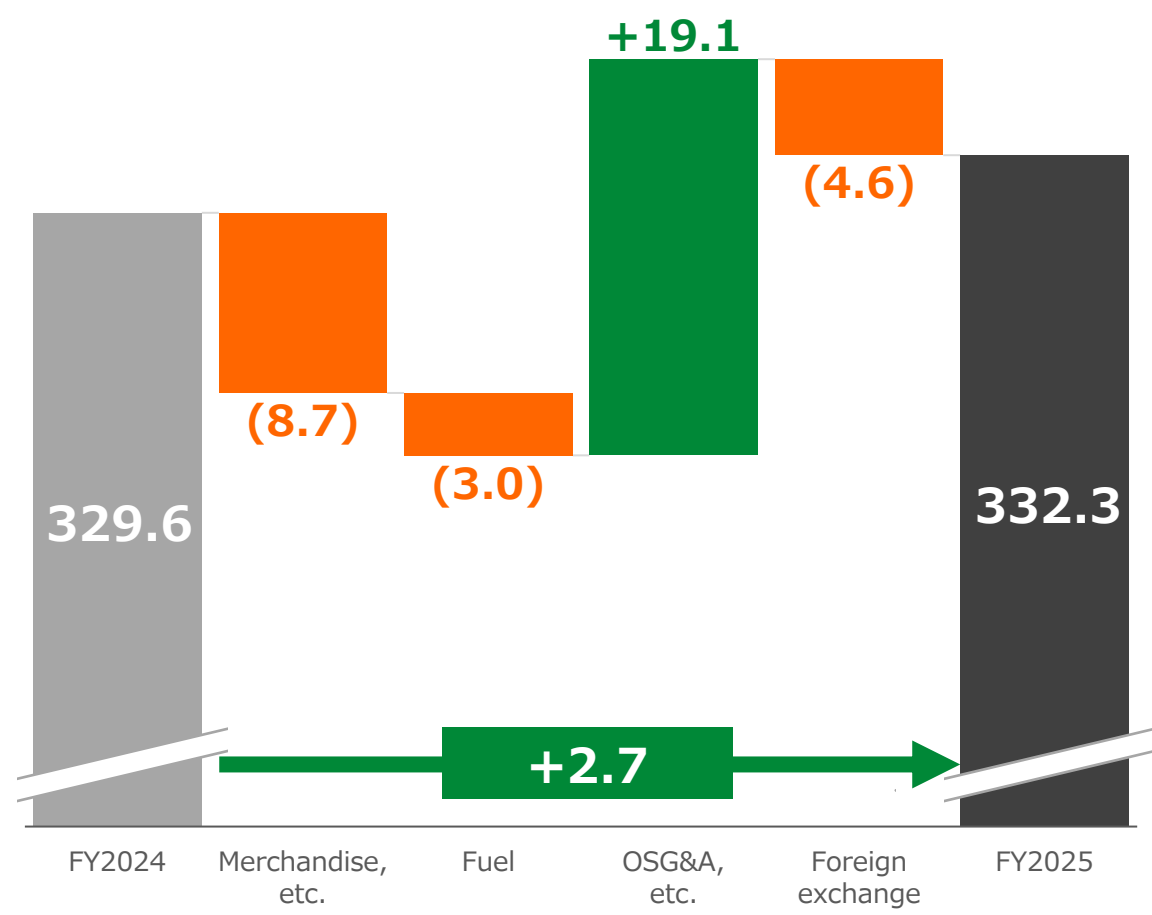
OSG&A

(Millions of dollar, %)

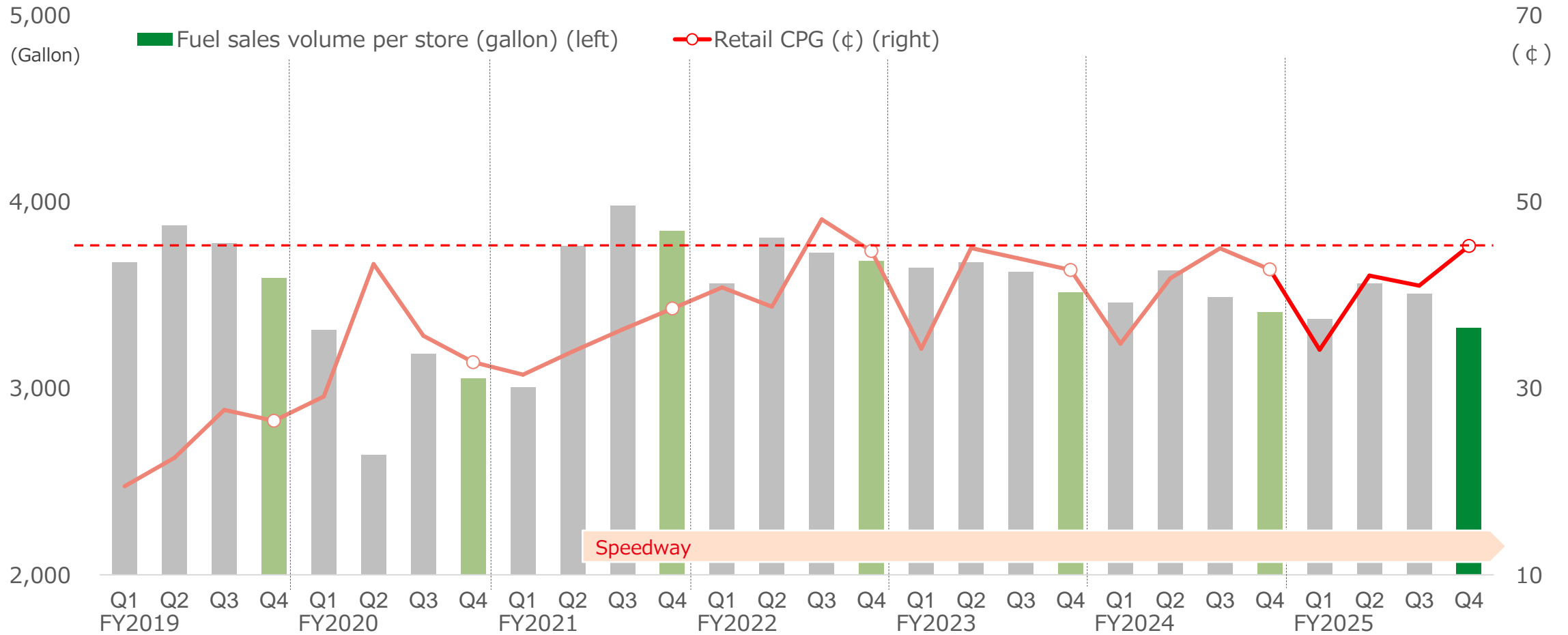
| | FY2025 | | | Major factors for change |
|-------------------------------|--------|-------|------------|--------------------------------------------------------------|
| | | YoY | YoY change | |
| OSG&A | 9,314 | 99.0 | (97) | |
| Advertising expenses | 129 | 96.2 | (5.1) | Decrease due to advertisement optimization |
| Salaries and wages | 2,991 | 99.1 | (26) | Decrease due to less corporate stores and labor optimization |
| Land and building rent | 1,230 | 106.6 | +75 | Increase due to inflation, etc. |
| Depreciation and amortization | 1,370 | 94.5 | (80) | Decrease due to fixed asset useful life reevaluation |
| Utility expenses | 546 | 101.6 | +8.3 | Increase in utility rates |
| Others | 3,045 | 97.7 | (70) | Decrease due to R&M costs and credit card fees, etc. |

Change in operating income

(Billions of yen)



Fuel sales volume / CPG (Retail)



Note) The chart shows retail fuel business

Eliminations/Corporate Expenses and Capex for Group Strategy



(Billions of yen)

| FY2025 results | Expenses | | | Capex | | |
|----------------------------------------------|----------|------------|----------|---------|------------|----------|
| | Results | YoY change | vs. Plan | Results | YoY change | vs. Plan |
| DX, system, security, etc. | (42.5) | +9.2 | +1.6 | 3.7 | (6.3) | (2.0) |
| Others | (24.6) | +0.53 | +16.7 | 0.38 | (0.83) | (0.08) |
| Eliminations/Corporate (Operating income) | (67.2) | +9.8 | +18.3 | 4.1 | (7.2) | (2.1) |

FY2026 Consolidated Financial Forecasts



(Billions of yen, %)

| | FY2025 like for like*1 | FY2026 plan | YoY | Change |
|---------------------------------------------|---------------------------|----------------|-------|--------|
| Convenience store group merchandise sales*2 | 9,768.6 | 10,030.0 | 102.7 | +261.3 |
| Revenues from operations | 9,510.3 | 9,448.0 | 99.3 | (62.3) |
| EBITDA | 866.8 | 891.0 | 102.8 | +24.1 |
| Operating income | 384.6 | 405.0 | 105.3 | +20.3 |
| Ordinary income | 352.2 | 367.0 | 104.2 | +14.7 |
| Net income attributable to owners of parent | 254.8 | 270.0 | 105.9 | +15.1 |
| EPS (yen) | 103.43 | 117.42 | 113.5 | +13.99 |
| EPS before amortization of goodwill (yen)*3 | 145.63 | 162.56 | 111.6 | +16.93 |

*1 Reflect the impact of deconsolidation of York HD and Seven Bank *2 Include merchandise sales from directly operated stores and franchised stores across consolidated convenience store subsidiaries

*3 Tax impact related to amortization of goodwill is taken into account

Notes) 1. Exchange rate: 1USD=150.00JPY, 1CNY=21.00JPY 2. EPS and EPS before amortization of good will reflect the estimated impact of future share buybacks

FY2026 Consolidated Financial Forecasts



(Billions of yen, %)

| | FY2025 results | FY2026 plan | YoY | Change |
|---------------------------------------------|-------------------|----------------|-------|---------|
| Convenience store group merchandise sales*1 | 9,768.6 | 10,030.0 | 102.7 | +261.3 |
| Revenues from operations | 10,430.2 | 9,448.0 | 90.6 | (982.2) |
| EBITDA | 942.8 | 891.0 | 94.5 | (51.8) |
| Operating income | 422.9 | 405.0 | 95.7 | (17.9) |
| Ordinary income | 377.4 | 367.0 | 97.2 | (10.4) |
| Net income attributable to owners of parent | 292.7 | 270.0 | 92.2 | (22.7) |
| EPS (yen) | 118.81 | 117.42 | 98.8 | (1.39) |
| EPS before amortization of goodwill (yen)*2 | 150.00 | 162.56 | 100.5 | +0.82 |

*1 Include merchandise sales from directly operated stores and franchised stores across consolidated convenience store subsidiaries *2 Tax impact related to amortization of goodwill is taken into account

Notes) 1. Exchange rate: 1USD=150.00JPY, 1CNY=21.00JPY 2. EPS and EPS before amortization of goodwill reflect the estimated impact of future share buybacks

FY2026 Consolidated Financial Forecasts (1H and 2H)



(Billions of yen, %)

| | | 1H | | 2H | |
|---------------------------------------------|---------|-------|------------|---------|--------------|
| | | YoY | YoY change | YoY | YoY change |
| Convenience store group merchandise sales | 5,003.0 | 103.2 | +156.3 | 5,027.0 | 102.1 +104.9 |
| Revenues from operations | 4,687.0 | 83.4 | (929.6) | 4,761.0 | 98.9 (52.6) |
| EBITDA | 432.0 | 89.0 | (53.4) | 459.0 | 100.3 +1.5 |
| Operating income | 190.0 | 91.2 | (18.3) | 215.0 | 100.2 +0.39 |
| Ordinary income | 168.0 | 90.1 | (18.4) | 199.0 | 104.2 +8.0 |
| Net income attributable to owners of parent | 88.0 | 72.2 | (33.8) | 182.0 | 106.5 +11.0 |
| EPS (yen) | 38.07 | 79.6 | (9.76) | 79.35 | 111.8 +8.37 |
| EPS before amortization of goodwill (yen)* | 60.52 | 88.0 | (8.24) | 102.04 | 109.7 +9.06 |

Note) Exchange rate: 1H 1USD=150.00JPY, 1CNY=21.00JPY 2H 1USD=150.00JPY, 1CNY=21.00JPY

FY2026 Forecasts by Operating Segment

(Billions of yen, %)

| | Revenues from operations | | | Operating income | | |
|-----------------------------------------|--------------------------|-------|------------|------------------|-------|------------|
| | | YoY | YoY change | | YoY | YoY change |
| Consolidated | 9,448.0 | 90.6 | (982.2) | 405.0 | 95.7 | (17.9) |
| Domestic CVS operations | 950.0 | 103.9 | +35.4 | 224.2 | 100.8 | +1.6 |
| Overseas CVS operations | 8,466.0 | 98.9 | (90.8) | 247.8 | 111.5 | +25.5 |
| 7-Eleven, Inc. [Millions of dollar]* | 51,500 | 97.9 | (1,102) | 2,375 | 106.9 | +153 |
| Others | 50.0 | 5.1 | (928.6) | 1.8 | 4.1 | (42.2) |
| Eliminations/Corporate | (18.0) | - | +1.7 | (68.8) | - | (2.9) |

* Figures are shown on SEI consolidated basis.

Note) Exchange rate: 1H 1USD=150.00JPY, 1CNY=21.00JPY 2H 1USD=150.00JPY, 1CNY=21.00JPY

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FY2026 Revenues from Operations Forecasts by Operating Segment (1H and 2H)



(Billions of yen, %)

| | | 1H | | 2H | |
|-----------------------------------------|---------|-------|------------|---------|-------------|
| | | YoY | YoY change | YoY | YoY change |
| Consolidated | 4,687.0 | 83.4 | (929.6) | 4,761.0 | 98.9 (52.6) |
| Domestic CVS operations | 478.0 | 103.3 | +15.4 | 472.0 | 104.4 +19.9 |
| Overseas CVS operations | 4,194.0 | 99.4 | (27.1) | 4,272.0 | 98.5 (63.7) |
| 7-Eleven, Inc. [Millions of dollar]* | 25,588 | 97.6 | (636) | 25,911 | 98.2 (465) |
| Others | 23.0 | 2.4 | (922.5) | 27.0 | 81.6 (6.1) |
| Eliminations/Corporate | (8.0) | - | +4.5 | (10.0) | - (2.8) |

* Figures are shown on SEI consolidated basis.

Note) Exchange rate: 1H 1USD=150.00JPY, 1CNY=21.00JPY 2H 1USD=150.00JPY, 1CNY=21.00JPY

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FY2026 Operating Income Forecasts by Operating Segment (1H and 2H)

(Billions of yen, %)

| | 1H | | | 2H | | |
|-----------------------------------------|--------|-------|------------|--------|-------|------------|
| | | YoY | YoY change | | YoY | YoY change |
| Consolidated | 190.0 | 91.2 | (18.3) | 215.0 | 100.2 | +0.39 |
| Domestic CVS operations | 120.4 | 98.9 | (1.3) | 103.8 | 103.0 | +3.0 |
| Overseas CVS operations | 104.4 | 130.3 | +24.2 | 143.4 | 100.9 | +1.3 |
| 7-Eleven, Inc. [Millions of dollar]* | 1,069 | 118.0 | +163 | 1,305 | 99.2 | (9.9) |
| Others | 0.40 | 1.0 | (41.0) | 1.4 | 52.9 | (1.2) |
| Eliminations/Corporate | (35.2) | - | (0.24) | (33.6) | - | (2.7) |

* Figures are shown on SEI consolidated basis.

Note) Exchange rate: 1H 1USD=150.00JPY, 1CNY=21.00JPY 2H 1USD=150.00JPY, 1CNY=21.00JPY

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